

2005 STANDARDS OF EXCELLENCE

Award for Excellence in Community Action
Community Action Partnership
1100 17th Street NW, Ste. 500
Washington DC 20036

August 2004

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1. Organizational Leadership

The Leadership Category examines how your agency's senior leaders address mission, values, direction, and performance expectations, while focusing on clients, constituents, customers/stakeholders, as well as empowerment of staff, innovation, and learning within the organization. It also examines how your organization is governed and how you address public responsibility, community advocacy, and low-income constituency involvement.

1.1 Leadership Focus

Senior leadership guides the agency by actively engaging Board members, staff, and partners, and by communicating clear direction, reinforcing organizational values, and setting high performance goals and objectives that meet the expectations of all stakeholders.

1.2 Mission Statement, Code of Ethics, Community Action Promise

The (1) organization's Mission Statement, (2) Community Action Code of Ethics, and (3) Promise of Community Action have been formally adopted by the CAA Board, and are prominently displayed throughout the organization including public places visited frequently by visitors and external customers/clients, and are integral to the agency's message to the community and day-to-day operations.

1.3 Board Structure/Function

The Board is knowledgeable of and actively involved in reviewing agency progress, performance, and results. It meets all legal and regulatory membership requirements, understands its role, and is fully engaged in all aspects of the organization's mission, strategic direction, and assessment of its success.

1.4 Committee/Advisory Group Roles/Actions

The Board has in place participatory Advisory Committees and/or Task Forces that actively represent their constituencies. This is demonstrated systematically via specific constituent issues recommended and acted on by the Board.

1.5 Community Advocacy

The agency is committed to advocacy on behalf of the low-income community. It has formally targeted specific low-income/poverty-related issues and demonstrated active advocacy for action that addresses these issues. The Board, Executive Director, and senior agency leadership actively and regularly engage legislative, regulatory, and/or community institutions and can demonstrate measurable impacts addressing advocacy issues and benefiting low-income constituencies. (Links to 2.3 – Agency Resources Focused on Broader Community Issues)

1.6 Low-Income Involvement

Over the past three years, the Board has adopted, acted upon, or formally supported issues specifically identified by or recommended by low-income representatives.

2. Strategic Planning and Direction

This area examines how your agency assesses needs, sets longer term/strategic direction and develops operational plans, updates these plans, and utilizes the strategic plan as a living document that guides the agency. It stresses that customer, community, and staff participation is an essential part of the planning process and that measures of progress must be incorporated and effectively utilized to assess progress over time.

2.1 Strategic Plan

A Strategic Plan is in place and is utilized by staff throughout the agency. The plan serves as the primary official document that guides the agency – linking mission/vision/values with strategies and serving as a road map that directs all agency action. (Links to 7.2 – Organizational/Program Effectiveness Results)

2.2 Plan Development/Updates

The agency has conducted a comprehensive assessment of poverty conditions as well as available resources to eliminate poverty based on current published information, its own surveys, and input from individual customers and stakeholders in low-income communities. The agency's strategic plan is current, and is updated in a regular, timely manner using a structured process that ensures community and client input in identifying critical needs.

2.3 Agency Resources Focused on Broader Community Issues

The agency has dedicated specific resources to involvement in community collaboration and advocacy that focuses on broader community needs including anti-poverty issues. (Links to 1.5 – Community Advocacy)

2.4 Mobilizing New Resources/New Programs/New Partnerships

Within its strategic framework, the agency has mobilized substantial additional (non-CSBG) dollars for every CSBG dollar it has received, and has regularly developed new programs, services, and partnerships in response to its community needs assessment and as identified in its strategic plan.

2.5 Strategic Measures of Success

As the primary agency guide, the Strategic Plan contains key performance measures and/or indicators for tracking goals and strategies and for measuring progress and success in achieving the agency's vision/mission. There is one or more measurable objective for all agency projects. (Links to 5.7 – Performance Management and Improvement System)

3. Customer, Constituent and Partner Focus

This area examines how your agency seeks to understand the voices of clients, customers, constituents, and stakeholders in the community. It stresses relationships as an important and integral part of an overall listening, learning, and performance excellence strategy, and examines how your organization builds relationships with clients/customers by using feedback and measured data (satisfaction) as essential information for improvement.

3.1 Customer/Constituent/Community Knowledge

The agency has clearly identified and targeted its key external customers and constituents/stakeholders in the community and deployed multiple listening strategies designed to solicit and assess feedback from them. (Links to 7.1 – Customer/Client Results and 5.7 – Performance Management and Improvement System)

3.2 Customer/Constituent Feedback System

The agency has deployed a systematic approach to collect and assess constituent/customer feedback, including the degree of satisfaction shown by the low-income community as well as other constituencies and stakeholders of the agency's programs and services. (Links to 5.7 – Performance Management and Improvement System)

3.3 Internal Improvement

The agency has deployed a systematic internal approach to solicit feedback from staff about the efficiency and effectiveness of internal operations, procedures, and employee work environments and conditions.

3.4 Reports on impacts/results

The agency regularly produces formal reports based on feedback data that provides evidence of a high degree of satisfaction among low-income clients, other community residents, and stakeholders with agency programs, services, and the agency overall. (Links to 7.1 – Client/Stakeholder/Customer Results)

3.5 Partnership System

The agency has adopted or identified in its strategic plan a formal approach to partnering as a method of operation supporting the achievement of its vision/mission and goals. This approach to partnering and partnerships interacts

both with long-standing and new organizations in the community on behalf of low-income people. (Links to 7.4 – Partner/Stakeholder Results)

4. Human Resource Focus

This category examines how your agency's staff learning and work systems enable all employees to develop and utilize their full potential, aligning with your organization's overall mission, strategies, and action plans. It also examines how your organization seeks to build and maintain a healthy and safe work environment that is supportive and conducive to excellent performance and organizational growth.

4.1 Policies, Procedures, and Personnel Systems

Personnel policies and procedures and employee records including job descriptions are current and up to date. Affirmative action, grievance, family leave, and drug policy provisions are in place. Salary levels are appropriate for the area and a plan is in place to offer a living wage to all employees. Fringe benefits address employee medical and retirement needs, and job descriptions support the implementation and success of the agency strategic goals, strategies, and related performance measures.

4.2 Employee Performance Management

A formal and systematic staff evaluation process is conducted annually and includes provisions for staff response.

4.3 Employee Engagement/Participation/Well-Being

Employees at every level of the agency are fully engaged and actively participate in the operations of the agency. Staff has the equipment, supplies, and material to achieve excellence in their jobs and the agency work environment is safe, secure, and supportive.

4.4 Staff Development and Learning System

The agency has deployed a formal and systematic approach for conducting and measuring staff development, growth, and training including new and current staff orientations covering agency mission, history, and the vision, values, Promise of Community Action, and ROMA. Provisions for employee recognition are addressed and the agency systematically assesses employee needs for future training using employee input, and evaluates the effectiveness and usefulness of offered training. (Links to 7.3 – Staff Development Results)

4.5 Low-Income on Staff

Low-income members of the community are regularly recruited and employed by the CAA. Individuals who were eligible for one or more of the agency's services at the time of hiring represent a significant percentage of full-time employees.

5. Organizational Process Management

This area examines your agency's key administrative support and program/service delivery processes and how your organization manages them to achieve overall agency growth and success.

Administrative Support Processes

5.1 Financial Systems

The financial system is integrated into the agency's performance management system, and effectively supports the goals of the agency by providing quick and easy access to financial information to all levels of the agency. It is user-driven and utilized as an effective tool for tracking performance and agency-wide improvement efforts. For the past three annual audits, no significant questioned or unresolved costs exist. (Links to 7.5 – Financial Accountability and Health)

5.2 Infrastructure Support

The agency has a formal system for building and equipment maintenance supporting a structured approach to regular and timely inspections/maintenance and upkeep services that are completed in accordance with a periodic, pre-set schedule.

5.3 Purchasing/Procurement

The agency has a formal procurement system with established procedures incorporating lists of suppliers of goods and services that are current, complete, and updated on a regular and systematic basis.

5.4 Communications/Public Relations

The agency has a formal and effective communication plan or policy deployed that incorporates multiple means of communicating with customers, stakeholders, and the community, including periodic press releases, newsletters, media events, reports, and other effective means of conveying the agency's message to the local media with positive news on its programs, activities, and results. Effectiveness of message and public perception of the agency are assessed and measured periodically.

Program/Service Delivery Processes

5.5 Intake, Eligibility, Assessment, Case Management, and Follow-up

The agency has effectively and efficiently integrated these five components into a service delivery system that ensures clients are well-served, have expectations met, and that program and agency goals are achieved.

5.6 Project Management

The agency has a systematic approach to managing all projects, programs, and initiatives including policy, procedures, guidelines, and training that ensures effective and efficient project management, meeting the following management elements for all existing agency projects:

1. Projects meet planned goals and objectives.
2. Projects regularly receive feedback from project's constituents/customers/stakeholders.
3. Project staff attend appropriate and necessary training sessions.
4. Project budgets are monitored and not exceeded.
5. Project facilities meet or exceed ADA and building codes.
6. Measurable (ROMA) objectives are included in each project.
7. Projects are evaluated to assess their degree of success.
8. Final results/status Report is produced at a project's conclusion.

5.7 Performance Management and Improvement System

The agency has in place a systematic and interactive approach to managing, tracking and improving agency performance. It serves the dual role to monitor, measure, analyze, and improve the effectiveness and efficiency of both internal administrative and program processes, as well as overall agency strategic and operational program performance. (Link to 6.2 – Information Management System and 7.2 – Organizational/Program Effectiveness)

6. Information Systems Management

This area examines your agency's information management and performance measurement systems and how your organization analyzes performance data and information and utilizes it to improve performance. It stresses the need for alignment between strategic and operational goals and day-to-day operations.

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6.1 Information System Technology

There is a highly effective, integrated management information system in place that ensures all agency programs and services are linked and that staff has ready, reliable, and accurate information for decision making and achieving success in their jobs.

6.2 Measurement and Analysis of Organizational Performance

The agency's information system monitors progress and results of the organization's overall goals as well as specific programs and services administered by the agency. It is capable of producing unduplicated counts of individuals served. (Links to 5.7 – Performance Management and Improvement System and 7.2 – Organizational/Program Effectiveness)

7. Organizational Results

This area examines your agency's performance and improvements in six areas – customer/client results, organizational/program results, partner/stakeholder results, financial health, human resources results, and recognition/innovation. In addition the agency's implementation of ROMA and its integration into everyday operations is stressed.

7.1 Client/Stakeholder/Customer Results

The agency collects and reports customer/client and constituent/stakeholder feedback/satisfaction information on programs and services it operates, and tracks it over time for trends. The agency uses this information as part of its performance and improvement strategies to improve or modify its operations. ROMA family and community goals for low-income self sufficiency, strengthening families, and affecting the conditions in which low-income live are addressed. (Links to 3.4 – Reports on Impacts/Results)

7.2 Organizational/Program Effectiveness

The agency's measurement/reporting system is in place and tracks the agency's progress and overall success in achieving agency and program goals. It is used effectively and systematically to inform the Board, staff, stakeholders, and the community. The organization consistently demonstrates excellent performance and improvement trends over time. ROMA is fully integrated into the agency's strategic approach and overall operation and all of the agency's programs and activities are contributing to the accomplishment of one or more of the six ROMA national goals. (Links to 5.7 Performance Management and Improvement System)

7.3 Staff Development/Internal Work Systems Results

The agency annually collects and analyzes staff feedback in a systematic approach, and tracks staff turnover and staff development success, including training, accreditation, and certifications, and regularly assesses and improves its internal administrative, operations, and work processes. The agency reports these results under ROMA Goal 5. (Links to 4.4 – Staff Development and Learning System)

7.4 Partner/Stakeholder Results

Annually the agency assesses current financial and non-financial partnerships' impact/benefits to identify strategies and opportunities to expand local relationships that support the organization's strategic and operational goals. Tangible results are evident from these partnerships. Data on partnerships is collected, analyzed, tracked, and used effectively to improve current relationships or establish new ones. The agency reports partnership results under ROMA goal 4. (Links to 3.5 – Partnership System)

7.5 Financial and Accountability Health

The agency's financial health is sound, resources are growing, and audit reports are exemplary. The agency has exceeded all regulatory requirements and is in good standing with current funding sources and required accreditation entities. Financial trend data is tracked and shows improvement over time. No unresolved questioned costs or material findings exist. External evaluations have been conducted recently and used as part of the agency's improvement strategies. (Links to 5.1 – Financial Systems)

7.6 Definitive or Noteworthy Community Recognition and Innovation

The agency has an established track record of innovation and community recognition for its achievements and commitment to its mission, vision, and operations.

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Senior leadership guides the agency by actively engaging Board members, staff, and partners, and by communicating clear direction, reinforcing organizational values, and setting high performance goals and objectives that meet the expectations of all stakeholders.¶

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The (1) organization's Mission Statement, (2) Community Action Code of Ethics, and (3) Promise of Community Action have been formally adopted by the CAA Board, and are prominently displayed throughout the organization including public places visited frequently by visitors and external customers/clients, and are integral to the agency's message to the community and day-to-day operations.¶

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The Board is knowledgeable of and actively involved in reviewing agency progress, performance, and results. It meets all legal and regulatory membership requirements, understands its role, and is fully engaged in all aspects of the organization's mission, strategic direction, and assessment of its success.¶

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1.4 Committee/Advisory Group Roles/Actions¶

The Board has in place participatory Advisory Committees and/or Task Forces that actively represent their constituencies. This is demonstrated systematically via specific constituent issues recommended and acted on by the Board.¶

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1.5 Community Advocacy¶

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The Board has in place participatory Advisory Committees and/or Task Forces that actively represent their constituencies. This is demonstrated systematically via specific constituent issues recommended and acted on by the Board.

1.5 Community Advocacy

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1.6 Low-Income Involvement

Over the past three years, the Board has adopted, acted upon, or formally supported issues specifically identified by or recommended by low-income representatives.

2. Strategic Planning and Direction

This area examines how your agency assesses needs, sets longer term/strategic direction, and develops operational plans, updates these plans, and utilizes the strategic plan as a living document that guides the agency. It stresses that client and community input is an essential part

of the planning process and that measures of progress must be incorporated and effectively utilized to assess progress over time.

2.1 Strategic Plan

A Strategic Plan is in place and is utilized by staff throughout the agency. The plan serves as the primary official document that guides the agency – linking mission/vision/values with strategies and serving as a road map that directs all agency action.

2.2 Plan Development/Updates

The agency has conducted a comprehensive assessment of poverty conditions as well as available resources to eliminate poverty based on current published information, its own surveys, and input from individual customers and stakeholders in low-income communities. The agency's strategic plan is current, and is updated in a regular, timely manner using a structured process that ensures community and client input in identifying critical needs.

2.3 Agency Resources Focused on Broader Community Issues

The agency has dedicated specific resources that focus on broader community needs including anti-poverty issues.

2.4 Mobilizing New Resources/New Programs/New Partnerships

Within its strategic framework, the agency has mobilized substantial additional (non-CSBG) dollars for every CSBG dollar it has received, and has regularly developed new programs, services, and partnerships in response to its community needs assessment and as identified in its strategic plan.

2.5 Strategic Measures of Success

As the primary agency guide, the Strategic Plan contains key performance measures and/or indicators for tracking goals and strategies and for measuring progress and success in achieving the agency's vision/mission. There is one or more measurable objective for all agency projects.

3. Customer, Constituent, and Partner Focus

This area examines how your agency seeks to understand the voices of clients, customers, constituents, and stakeholders in the community. It stresses relationships as an important and integral part of an overall listening, learning, and performance excellence strategy, and examines how your organization builds relationships with clients/customers by using feedback and measured data (satisfaction) as essential information for improvement.

3.1 Customer/Constituent/Community Knowledge

The agency has clearly identified and targeted its key external customers and constituents/stakeholders in the community and deployed multiple listening strategies designed to solicit and assess feedback from them.

3.2 Customer/Constituent Feedback System

The agency has deployed a systematic approach to collect and assess constituent/customer feedback, including the degree of satisfaction shown by the low-income community as well as other constituencies and stakeholders of the agency's programs and services.

3.3 Internal Improvement

The agency has deployed a systematic internal approach to solicit feedback from staff about the efficiency and effectiveness of internal operations, procedures, and employee work environments and conditions.

3.4 Reports on Impacts/Results

The agency regularly produces formal reports based on feedback data that provides evidence of a high degree of satisfaction among low-income clients, other community residents, and stakeholders with agency programs, services, and the agency overall. (Links with Results – 7.1)

3.5 Partnership System

The agency has adopted or identified in its strategic plan a formal approach to partnering as a method of operation supporting the achievement of its vision/mission and goals. This approach to partnering and partnerships interacts both with long-standing and new organizations in the community on behalf of low-income people. (Links to 7.4 Results)

4. Human Resource Focus

This category examines how your agency's staff learning and work systems enable all employees to develop and utilize their full potential, aligning with your organization's overall mission, strategies, and action plans. It also examines how your organization seeks to build and maintain a healthy and safe work environment that is supportive and conducive of excellent performance and organizational growth. (Links with 7.3)

4.1 Policies, Procedures, and Personnel Systems

Personnel policies and procedures and employee records including job descriptions are current and up to date. Affirmative action, grievance, family leave, and drug policy provisions are in place. Salary levels are appropriate for the area and a plan is in place to offer a living wage to all employees. Fringe benefits address employee medical and retirement needs, and job descriptions support the implementation and success of the agency strategic goals, strategies, and related performance measures.

4.2 Employee Performance Management

A formal and systematic staff evaluation process is conducted annually and includes provisions for staff response.

4.3 Employee Engagement/Participation/Well-Being

Employees at every level of the agency are fully engaged and actively participate in the operations of the agency. Staff has the equipment, supplies, and material to achieve excellence in their jobs and the agency work environment is safe, secure, and supportive.

4.4 Staff Development and Learning System

The agency has deployed a formal and systematic approach for conducting and measuring staff development, growth, and training including new and current staff orientations covering agency mission, history, and the vision, values, and Promise of Community Action. Provisions for employee recognition are addressed and the agency systematically assesses employee needs for future training using employee input, and evaluates the effectiveness and usefulness of offered training.

4.5 Low-Income on Staff

Low-income members of the community are regularly recruited and employed by the CAA. Individuals who were eligible for one or more of the agency's services at the time of hiring represent a significant percentage of full-time employees.

5. Organizational Process Management

This area examines your agency's key administrative support and program/service delivery processes and how your organization manages them to achieve overall agency growth and success.

Administrative Support Processes

5.1 Financial Systems

The financial system is integrated into the agency's performance management system, and effectively supports the goals of the agency by providing quick and easy access to financial information to all levels of the agency. It is user-driven and utilized as an effective tool for tracking performance and agency-wide improvement efforts. For the past three annual audits, no significant questioned or unresolved costs exist.

5.2 Infrastructure Support

The agency has a formal system for building and equipment maintenance supporting a structured approach to regular and timely inspections/maintenance and upkeep services that are completed in accordance with a periodic, pre-set schedule.

5.3 Purchasing/Procurement

The agency has a formal procurement system with established procedures incorporating lists of suppliers of goods and services that are current, complete, and updated on a regular and systematic basis.

5.4 Communications/Public Relations

The agency has a formal and effective communication plan or policy deployed that incorporates multiple means of communicating with customers, stakeholders, and the community, including periodic press releases, newsletters, media events, reports, and other effective means of conveying the agency's message to the local media with positive news on its programs, activities, and results. Effectiveness of message and public perception of the agency are assessed and measured periodically.

Program/Service Delivery Processes

5.5 Intake, Eligibility, Assessment, Case Management, and Follow-up

The agency has effectively and efficiently integrated these five components into a service delivery system that ensures clients are well-served, have expectations met, and that program and agency goals are achieved.

5.6 Project Management

The agency has a systematic approach to managing all projects, programs, and initiatives including policy, procedures, guidelines, and training that ensures effective and efficient project management, meeting the following management elements for all existing agency projects:

- 1. Projects meet planned goals and objectives.*
- 2. Projects regularly receive feedback from project constituents/customers/stakeholders.*
- 3. Project staff attend appropriate and necessary training sessions.*
- 4. Project budgets are monitored and not exceeded.*
- 5. Project facilities meet or exceed ADA and building codes.*
- 6. Measurable (ROMA) objectives are included in each project.*
- 7. Projects are evaluated to assess their degree of success.*
- 8. Final results/status report is produced at a project's conclusion.*

5.7 Performance Management and Improvement System

The agency has in place a systematic and interactive approach to managing, tracking, and improving agency performance. It serves the dual roles of monitoring, measuring, analyzing, and improving both the effectiveness and efficiency of internal administrative and program processes, as well as overall agency strategic and operational program performance. (Link to 6.2 – Information System and 7.2 – Organizational Effectiveness)

6. Information Systems Management

This area examines your agency's information management and performance measurement systems and how your organization analyzes performance data and information and utilizes it to improve performance. It stresses the need for alignment between strategic and operational goals and day-to-day operations.

6.1 Information System Technology

There is a highly effective, integrated management information system in place that ensures all agency programs and services are linked and that staff has ready, reliable, and accurate information for decision making and achieving success in their jobs.

6.2 Measurement and Analysis of Organizational Performance

The agency's information system monitors progress and results of the organization's overall goals as well as specific programs and services administered by the agency. It is capable of producing unduplicated counts of individuals served.

7. Organizational Results

This area examines your agency's performance and improvements in six key sub-areas – customer/client results, program results, financial health, human resource results, accountability, and recognition/innovation. In addition the agency's implementation of ROMA and its integration into everyday operations is stressed.

7.1 Client/Stakeholder/Customer Results

The agency collects and reports customer/client and constituent/stakeholder feedback/satisfaction information on programs and services it operates, and tracks it over time for trends. The agency uses this information as part of its performance and improvement strategies to improve or modify

its operations. ROMA family and community goals for low-income self sufficiency, strengthening families, and affecting the conditions in which low-income live are addressed. (Links to 3.4)

7.2 Organizational/Program Effectiveness

The agency's measurement/reporting system is in place and tracks the agency's progress and overall success in achieving agency and program goals. It is used effectively and systematically to inform the Board, staff, stakeholders, and the community. The organization consistently demonstrates excellent performance and improvement trends over time. ROMA is fully integrated into the agency's strategic approach and overall operation and all of the agency's programs are reporting under the six ROMA goals. (Links to 5.7)

7.3 Staff Development/Internal Work Systems Results

The agency annually collects and analyzes staff feedback in a systematic approach, and tracks staff turnover and staff development success, including training, accreditation, and certifications, and regularly assesses and improves its internal administrative, operations, and work processes. The agency has addressed ROMA goals for increasing agency capacity. (Links to 4.4)

7.4 Partner/Stakeholder Results

Annually the agency assesses current financial and non-financial partnerships' impact/benefits to identify strategies and opportunities to expand local relationships that support the organization's strategic and operational goals. Tangible results are evident from these partnerships. Data on partnerships is collected, analyzed, tracked, and used effectively to improve current relationships or establish new ones. The agency has addressed ROMA goals on partnership development. (Linked to 3.5)

7.5 Financial and Accountability Health

The agency's financial health is sound, resources are growing, and audit reports are exemplary. The agency has exceeded all regulatory requirements and is in good standing with current funding sources and required accreditation entities. Financial trend data is tracked and shows improvement over time. No unresolved questioned costs or material findings exist. External evaluations have been conducted recently and used as part of the agency's improvement strategies. (Links to 5.1)

7.6 Definitive or Noteworthy Community Recognition and Innovation

The agency has an established track record of innovation and community recognition for its achievements and commitment to its mission, vision, and operations.